CURRICULUM VITAE
updated 10/17/2026

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EXPERT WITNESS FOR STANDARD OF CARE, AND BAD FAITH

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I. LICENSES, DEGREES, AND PROFESSIONAL DESIGNATIONS

My unique background in insurance, as an agency owner, in academics and human resources, provides an in-depth opinion on insurance agency operations and the reasonable duties expected and performed by an insurance producer and agency. My professional advanced designations and experience provide an in-depth understanding of coverages and duties of insurance producers, underwriters, surplus lines and settling claims. Please see attached for an overview of my insurance professional designations.

A. Licensed for Property and Casualty Insurance since 1980 (currently licensed in several states)
B. Licensed for Life and Health Insurance since 1988
C. Bachelor's in business management 1995
D. Master's degree in business administration (MBA) 1998
E. Master's degree in human resources (MA.HR) 2002
F. SHRM Senior Certified Professional (SCP) 2019

PROFESSIONAL DESIGNATIONS IN THE INSURANCE INDUSTRY

G. Associates in Claims (AIC) 2025
H. Associates in Surplus Lines Insurance (ASLA) 2026
I. Certified Insurance Counselor (CIC) 1991
J. Chartered Property Casualty Underwriter (CPCU) 2022

II. CONSULTANT/EXPERT WITNESS EXPERIENCE AND FEES EXPERIENCE

A. Worked on over sixty-eight court cases as a consultant/expert
B. Deposition and Trial Experience
C. No Retainer necessary $300 per hour including trials and depositions

III. INSTRUCTOR EXPERIENCE

A. Since 2002 I have taught several college business courses as an adjunct (including all the HR disciplines) collegiately and since 2018 I have collegiately taught insurance courses at two community colleges
B. From 2002 through 2023 I taught various state approved continuing education courses
C. 2018 through 2019 I taught insurance courses at Glendale Community College
D. 2022 to Present I teach a Risk Management Course and Insurance Course at Rio Salado Community College
E. Served on the President's Advisory Circle at Glendale Community College from 2004 through 2021 (non-paid position)

IV. INSURANCE AGENCY OWNER AND INSURANCE INDUSTRY EXPERIENCE

A. I have been an owner and insurance producer in a family business Ideal Insurance Agency {hereinafter "IIA"} since 1982 that Incorporated in 1983. The independent insurance agency was started from nothing and has grown to be one of the largest in the west valley of the Phoenix area. I am now 100% owner of Ideal Insurance Agency. www.idealins.com
B. IIA currently has two offices in Arizona. The offices are located in Surprise and Glendale and recently expanded into Colorado
C. From 1998 through 2018 I reviewed the Arizona State Licensure Exams for the Arizona Department of Insurance. The exam reviews included Property/Casualty and Life/Health Insurance
D. Served on the Independent Insurance Agents and Brokers of Arizona Board of Directors for six years
E. I was State President for the Independent Insurance Agents and Brokers of Arizona in 2009-2010
F. I have served as the Education Chair for the Independent Insurance Agents and Brokers of Arizona
G. Currently I serve as the State Membership Chair for the Independent Insurance Agents and Brokers of Arizona 2019 to Present

V. Insurance Industry Awards

A. Archie Mendelsohn Award given for leadership and mentoring new insurance Agents 2004
B. Charles W. Traubel Memorial Award given as a tribute in recognition of Charles Traubel who maintained the highest standards of service and integrity for insurance in Arizona. It is awarded to a recipient who has made an extra effort and contribution in time and effort to further the interest of the Independent Insurance Agents of Arizona 2012
C. Committee Chair of the Year for the Independent Insurance Agents and Brokers of Arizona 2011
D. Committee Chair of the Year for the Independent Insurance Agents and Brokers of Arizona 2012

VI. IIA's Community Involvement

A. Chair of the Board for the Justice Center (non-paid; the Justice Center serves several needs of approximately five hundred homeless and working poor per month)
B. Served on Glendale Chamber of Commerce Board of Directors 2001-2007 (In 2004 was Chair of the Board (non-paid)
C. Served again on Glendale Chamber Board from 2013 through 2015. In 2014 I was elected again to be the Board Chair (non-paid)
D. Served on the Peoria Chamber of Commerce Board from 2018 to July 2026. I was Chair of the Board in 2019. In 2024 I was elected again as Chair of the Board of Directors.
E. Serve on the State CPCU Board of Directors 2025 and 2026

F. Serve on the Christmas Parade committee located in Glendale Arizona (proceeds of the parade go to the local food bank). In 2017 was the Chair of the Board of Directors.
G. Served on the Board of Directors for nine years and I am currently President of the Justice Center. This organization works to service the legal needs of the working poor and homeless. Services also include providing documents for ID, collecting mail, and transitioning many people off the streets. Currently helping to serve the needs of several hundred per month.
H. IIA in 2022 the Mayor of Glendale named IIA as Business of the Week
I. The local newspapers (Glendale Star and Peoria Times) have named IIA Best Insurance Agency in Glendale for 2022, 2023, 2024, 2025
J. In addition, the local newspapers (Glendale Star and Peoria Times) have named IIA Best Insurance Agency in the West Valley for 2022, 2023, and 2024.

VII. ARTICLES WRITTEN AND PUBLISHED INCLUDE THE FOLLOWING:

A. HR Risk Management Tip Employees Using Their Own Vehicles for Company Business February 2006. Published by News and Views 2005 (Independent Insurance Agents of Arizona Publication) also revised and published in HR & Employment Law Compliance Guide for Arizona Employers. It is republished annually)
B. How to navigate Employees through the Storms of our Economy. Coauthored with Steward Segall PhD News and Views March/April 2009
C. Independent Contractors or Employees News and Views March 2011
D. Happy New Year It's That Time Again News and Views Coauthored with John Perkins MBA, SPHR January/February 2012
E. Is it Just a Job or is it a Profession? The Auto-Owners Trade Magazine Emblem August Edition 2016

Overview of my Insurance Professional Certifications

When we see the letters for my professional insurance designations as follows ASLA, CPCU, AIC, and CIC a person may see that I have done a lot of studying in the area of insurance, along with passing a lot of tests, but perhaps not understand the body of knowledge I have successfully completed in addition to being licensed in Property and Casualty, Life and Health Insurance. This is an overview of some of the body of knowledge these insurance professional designations represent.

1.ASLA represent the Associates in Surplus Lines Insurance. The credential body is The Institutes and supported by WSIA Education Foundation. This is the newest insurance professional designation I have successfully earned through studying and challenging testing. Individuals seek out this surplus lines designation to gain knowledge and further their surplus lines careers. This designation sets the individual apart as a surplus lines underwriter, surplus lines claims professional, managing general agent or a compliance officer, as it focuses 100% on excess and surplus lines. This designation has four parts and trains an individual to:

- Master Complex Risk Placements through evaluating and underwriting non-standard risks that are declined by standard admitted carriers
- Provides Comprehensive Knowledge that provides a firm foundation for surplus lines insurance marketing, distribution in surplus lines, reinsurance, surplus lines underwriting, compliance and regulations

The two core courses I took for the ASLA and successfully passed the challenging exams to show competence for this designation were as follows:

- ASLI 320 Understanding Surplus Lines Operations
- ASLI 321 Managing Risks with Surplus Lines Coverage

The two other parts of ASLA were waived because of my CPCU designation

2. AIC represent the Associates in Claims. I earned this designation in 2025. There are three parts that need to be successfully completed through passing exams. The credential body is The Institutes. This designation helps gain expertise in:

- Technical skills in valuation, loss prevention, negotiations, how to avoid litigation and managing a claim in good faith.
- Detection of Fraud and how to spot it more effectively
- Broadens the Perspective of Settling Claims to include how claims interact with the public and legal system.

3. CPCU represents Chartered Property Casualty Underwriting. I received this insurance professional designation in 2022. There are eight parts to successfully attain this designation. The credential body is The Institutes. The CPCU designation provides high industry recognition. Only 4% of all the insurance sectors have attained this designation and is considered by many to be equivalent to a Master's Degree in insurance. It proves academic seriousness in underwriting, claims, risk control, designing programs and an overview of surplus lines and the standard market including regulatory compliance, understanding policies, forms

dec pages and contract language. To obtain my CPCU designation I successfully completed the following courses:

- CPCU 500 Managing Evolving Risks
- CPCU 520 Connecting the Business of Insurance Operations
- CPCU 530 Navigating the Legal Aspects of Insurance
- CPCU 540 Impacting the Bottom Line of Insurance (course and test waived because I have an MBA)
- CPCU 551 Addressing Commercial Property Risks
- CPCU 552 Addressing Commercial Property Risks
- CPCU 553 Understanding Personal Insurance and Finance
- Ethics 312 Ethical Guidelines for CPCU's

4. CIC represents Certified Insurance Counselor. I received this professional insurance designation in 1991, and I still have the CIC insurance professional designation and continue to take updated courses to maintain this credential. The credential body is Risk & Insurance Education Alliance. CIC trains an individual in insurance underwriting, risk assessment, and client advisory services. To earn this designation I took the courses and passed five challenging essay exams in the following areas:

- Personal Lines
- Commercial Casualty
- Commercial Property
- Agency Management
- Life and Health Insurance